

Maximizing After-Tax Business Sales Process: Comprehensive Timeline and Action Steps

Timeline

Your Success Depends on the Right Team: Value Optimizer, Wealth Manager, Tax Attorney, M&A Accountant (Audit & Tax), Accounting Firm, Investment Banker or Business Broker, Valuation Specialist, and Estate Planner.

36-60 MONTHS BEFORE

Experts: Value Optimizer, Tax Attorney, Wealth Manager, Accounting Firm, Valuation Specialist

24-36 MONTHS BEFORE

Experts: Value Optimizer, Wealth Manager, Tax Attorney, Accounting Firm, Insurance Professional

12-24 MONTHS BEFORE

Experts: Accounting Firm, Value Optimizer, Accountant, Tax Attorney, Wealth Manager, M&A Banker

6-12 MONTHS BEFORE

Experts: Tax Attorney, Wealth Manager, Transaction Attorney, M&A Banker, Value Optimizer, Accounting Firm

1-6 MONTHS BEFORE

Experts: M&A Banker, Transaction Attorney, Wealth Manager, Insurance Professional, Estate Planner, Value Optimizer, Accounting

Engage Core Team	Evaluate Business Structure & Potential Restructuring
Comprehensive Business Valuation and Transferrable Assets	Begin Estate Planning
Align Goals - Business and Personal	Establish Clean Financial Records/Begin 3 Years Audited Financials
Optimize Transferable Value	Review & Update Insurance Policies
Implement Charitable Planning	
Develop Stock Gifting Strategies or Evaluate Opportunity Zone Investments	
Interview & Select Investment Banker	Evaluate State Tax Implications
Perform Quality of Earnings Analysis	Develop Post-Sale Investment Strategy
Finalize Tax Structure Decisions & Documentation	Create a Personal Transition Plan
Refine Tax Strategies	
Finalize Post-Sale Lifestyle Budget	Determine Income Replacement Strategies
Coordinate with All Advisors	
Finalize Sale Agreements	Verify Trust Funding Arrangements & Update Documents
Establish Liquidity	Review Non-Compete Agreements & Finalize Transition Roles
Secure Risk Management Strategies	



Book A FREE 30-Minute Online Consultation With Me Today

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